

Appendix P:

Puget Sound Acquisition and Restoration Fund¹

Note: The state 2013-2015 capital budget includes \$80 million to accelerate implementation of the Puget Sound Salmon Recovery Plan. The request includes two components with two processes for allocating funds: \$30 million is allocated to watersheds to advance projects that ensure every watershed in Puget Sound is making significant progress and \$50 million is allocated to a large, capital project list that were regionally sequenced using criteria for ranking pre-proposals. These funds were requested by Governor Chris Gregoire as part of her initiative to protect and restore Puget Sound by 2020. As this is being drafted, it is expected that the budget will direct the SRFB to distribute these funds in coordination with the Puget Sound Partnership. If necessary, this guidance will be redrafted to reflect any unexpected changes to the budget proviso for this funding. The following policies were developed in coordination with the Puget Sound Partnership.

Process

The Puget Sound Acquisition and Restoration fund will not be intermingled with state or federal (Pacific Coastal Salmon Recovery Fund) SRFB funds. The Puget Sound Acquisition and Restoration fund will be tracked separately in PRISM to ensure the SRFB and partners can account accurately for the use of the money. To improve flexibility and quickly get funding to projects when they are ready to go for construction, the following opportunities exist to allocate Puget Sound Acquisition and Restoration funds for the 2013-2015 biennium:

¹ While acquisition projects are eligible for funding; state agencies are restricted to restoration projects only.

1. 2013-2015 Puget Sound Acquisition and Restoration fund allocation was approved by the Puget Sound Salmon Recovery Council, Puget Sound Partnership Leadership Council, and the Salmon Recovery Funding Board.
2. Projects can undergo early action in 2013 using the schedule below.
3. Large, capital projects can move through the early action or the standard process, which includes local vetting and review panel technical review. Projects will be funded down the large capital list (30 projects) if others receive funding by other sources or drop out due to unforeseen circumstances.
4. Additional rounds will be conducted, as necessary, depending on project readiness and watersheds' needs.

The Puget Sound Partnership will coordinate with lead entities and the SRFB to submit projects accordingly.

Puget Sound lead entities will use a revised version of the Lead Entity List Memorandum (see [Appendix F-2](#) that includes a new column for the amount of Puget Sound Acquisition and Restoration funds requested). Puget Sound Acquisition and Restoration projects will be evaluated and prioritized using the same local process as for SRFB projects, including review by the SRFB Review Panel. Proposed projects will be reviewed by the Leadership Council of the Puget Sound Partnership and the SRFB for approval to award project grants.

Allocation Method

Puget Sound Acquisition and Restoration funds will be allocated to lead entities and watershed planning areas using the distribution formula recommended by the Puget Sound Salmon Recovery Council and approved by the Puget Sound Partnership Leadership Council for the first \$30 million of available funds. Each watershed and lead entity will compile a Puget Sound Acquisition and Restoration project list for the amount allocated for that watershed or lead entity. The SRFB will allocate Puget Sound Acquisition and Restoration funds according to review and approvals associated with the various project submittal opportunities described in the "Process" section. Therefore, lead entities and watershed planning areas can use their entire allocations in one round or spread their allocations over multiple rounds.

The remaining funds will be allocated to large capital projects sequenced by the Puget Sound Salmon Recovery Council in a process approved by the Puget Sound Partnership Leadership Council. These regionally-sequenced projects still would be subject to local vetting and technical review by the SRFB Review Panel.

Early Action Option

All Puget Sound Acquisition and Restoration projects that are identified and able to advance in 2013 are encouraged to use the “early action” option for receiving approval and funding ahead of the normal SRFB and Puget Sound Acquisition and Restoration schedule. The following dates and steps are necessary for opting in to early action during the 2013-2015 biennium:

- February 2013: Deadline for lead entity coordinator to notify Puget Sound Partnership and RCO of intent to use early action process.
- February 2013: Scheduled review panel site visit (refer to [Grant Schedule](#) in *Manual 18, Salmon Recovery Grants* for this date)
- May – June 2013: Complete site visits (early action and standard projects reviewed by review panel). Final applications submitted in PRISM three weeks ahead of the site visit.
- July 1, 2013: 2013-2015 funds available. Projects with no technical concerns by the review panel advance in the early action process.
- July 15, 2013: Lead entity submits signed copy of its F2 for projects qualifying for early action. Other watershed projects are subject to a separate F2 form for their projects undergoing the standard review schedule.
- No earlier than July 30 and no later than August 30: SRFB conference call to approve funding.

Return Funds

If an approved Puget Sound Acquisition and Restoration project cannot be implemented due to a change in circumstances or is completed under budget within the allowable timeframe, return funds will be:

- Returned as Puget Sound Acquisition and Restoration funds (not Pacific Coastal Salmon Recovery Funds);
- Awarded to another approved Puget Sound Acquisition and Restoration project within the lead entity if it can be expended within the allowable timeframe.
- Awarded to another lead entity needing funds to complete an approved Puget Sound Acquisition and Restoration project if it can be implemented within the allowable timeframe.

If the return funds cannot be used within the allowable timeframe, these funds may be pooled into a regional fund to address cost increases for Puget Sound Acquisition and

Restoration projects in areas where lead entities have no Puget Sound Acquisition and Restoration funds available to complete those projects. These regional funds will be limited to completing projects within their existing scope, via a process described in greater detail below.

In all cases, cost increase requests must adhere to the SRFB amendment process. Puget Sound Acquisition and Restoration return funds only may be applied to cost increases on projects previously funded in whole or in part by the Puget Sound Acquisition and Restoration. Projects previously funded entirely by SRFB will not be eligible to receive Puget Sound Acquisition and Restoration return funds (see [Appendix B](#)). RCO is developing a database application in PRISM that will allow lead entities, the region, and others to track the disposition of Puget Sound Acquisition and Restoration funds within each watershed in real time, which will assist lead entities in determining the availability of return funds during the 2013-15 biennium and whether those funds can be applied to other Puget Sound Acquisition and Restoration projects in their watersheds.

All funds must be expended within 4 years of the date on which the funds were appropriated; the 2013-15 allocation, for example, must be expended by June 30, 2017 (see table below). Funds that cannot be expended by lead entities within the allowable timeframe and via the processes described above will be pooled into a regional fund to be allocated by the Puget Sound Partnership, in coordination with RCO. The partnership will allocate regional return funds to projects that are:

- On the watershed's 3-year work plan.
- Reviewed and approved by the SRFB.
- Accompanied with a detailed justification for increase (following standard SRFB amendment process).
- Time sensitive.
- Unable to pull funds from elsewhere to make up the difference.
- Lead entity has no additional Puget Sound Acquisition and Restoration funds available.

Priority for regional return funds will be given to 2009-11 Puget Sound Acquisition and Restoration projects that have experienced a cost increase. Depending on available return funds, the partnership then will allocate funds to support cost increases for 2011-13 Puget Sound Acquisition and Restoration projects, on a first-come, first-served basis.

Biennium initially funded	2007-2009	2009-2011	2011-2013	2013-2015
Recipient of Returned Funds	Puget Sound Partnership	Puget Sound Partnership	Lead Entity	Lead Entity
Funds Expire June 30 of	2011	2013	2015	2017

Project Eligibility

Puget Sound Acquisition and Restoration projects must meet the same eligibility requirements as SRFB projects described in Section 2 of *Manual 18, Salmon Recovery Grants*. Puget Sound Acquisition and Restoration funding is focused largely on habitat protection and restoration projects; however, the following exceptions will apply:

- Projects identified through the Puget Sound salmon recovery watershed 3-year work plans as the highest priority projects, even if they do not meet SRFB eligibility requirements, will be eligible for Puget Sound Acquisition and Restoration funding. All projects will be reviewed by the SRFB Review Panel (complemented by information from the Puget Sound Recovery Implementation Technical Team and other experts in the subject matter if needed), and evaluated to the extent possible using the Project of Concern criteria ([Appendix E: SRFB Review Panel Evaluation Criteria](#)) used for traditional SRFB projects.
- Assessments or research projects, including those intended to fill data gaps identified in the recovery plan or lead entity strategies are eligible; however, it should be noted that the legislative emphasis is toward applying Puget Sound Acquisition and Restoration funds to habitat restoration and protection projects.
- Phased design/construction projects (see below).

Match

There is a 15 percent match required for Puget Sound Acquisition and Restoration projects. SRFB funds and Puget Sound Acquisition and Restoration funds may be used as the funding source for the same project, but each must have its own separate match. Recognizing that it may be difficult for some project sponsors to find match on this short implementation schedule, the SRFB will allow for project “design-only” contracts to be issued without a match requirement. However, the ensuing construction contracts must meet the 15 percent match requirement. If project sponsors request design-only

contracts, lead entities should reserve sufficient funds in their overall allocations to cover at least a portion of the estimated construction costs. (Please see the Restoration Design-Only Section below). SRFB may allow a smaller match in the cases of the large capital projects due to the overall cost and nature of these projects.

Role of the SRFB Review Panel

The technical review of Puget Sound Acquisition and Restoration projects will follow the process used to review SRFB projects. Review of Puget Sound Acquisition and Restoration projects will result in an increased workload for SRFB staff and review panel members.

Sequenced Large Capital Projects

In 2012, the Puget Sound Salmon Recovery Council adopted a new approach and process for allocating 2013-2015 Puget Sound Acquisition and Restoration funds, which included the development of a sequenced list of large capital projects to be funded following an allocation of \$30 million to the watersheds. The sequenced list of projects was generated through an Request for Proposal and selection process using eligibility and criteria developed by the Puget Sound Salmon Recovery Council and approved by the Puget Sound Partnership Leadership Council. Sequencing criteria included:

- Makes progress toward a Puget Sound *Action Agenda* target for protection or restoration of habitat (e.g. shoreline armoring, eelgrass, estuaries, etc.).
- Results in an improvement in abundance, productivity, diversity, and/or spatial distribution for one or more populations of listed Evolutionarily Significant Units.
- Benefits multiple listed salmon and steelhead populations.
- Level of design work completed for project (for restoration projects).
- Stage of project development (for acquisition projects).
- Match funding provided by project sponsor.

Restoration: Phased Design and Construction Projects

To accelerate implementation of projects funded under Puget Sound Acquisition and Restoration fund, the SRFB authorized phased design/construction grants for projects using an expedited process.

Design Phase

The following applies:

1. Design projects must produce conceptual design evaluation (feasibility study), preliminary design, and final design. Design work must be completed within 18 months of the board funded date. (Please refer to the definitions of design projects in [Appendix D](#)).
2. Projects must be listed in a Puget Sound Salmon Recovery Plan watershed 3-year work plan.
3. Applicants would use the existing SRFB project application for design projects and submit applications according to the appropriate timing for whichever round they are seeking funding as part of a lead entity list and/or Puget Sound Partnership list for Puget Sound Acquisition and Restoration funds. Design-only projects should be recorded on the Lead Entity List Memorandum ([Appendix F-2](#)) along with the funding requested for completing the design. In addition, estimated funds needed for the construction phase should be identified in a separate column on the list. Construction phase funds may cover all or a portion of the estimated construction costs. The total costs requested on a lead entity list, including design costs and funds identified for later construction, should be within the total allocation for that Puget Sound lead entity.
4. The Puget Sound Recovery Implementation Technical Team will evaluate the strategic nature of design-only projects as well as the other projects on each lead entity's list to ensure consistency with the Puget Sound regional and watershed recovery plans. SRFB Review Panel members will visit the proposed project site and review the application to evaluate the technical merits of the project using SRFB Project of Concern criteria. Reviewers will consider the conceptual idea, the cost-effectiveness of design development, and the likelihood that, if constructed, the project would provide the stated benefits. Design projects will be submitted to the SRFB for approval, after which SRFB staff will develop a project agreement with sponsors, to include deliverables defined (see [Appendix D](#)).
5. No match would be required on approved design phases of projects. A match will be required on the later construction phase.

Construction phase

Lead entities may use a portion of their allocations for restoration projects at a later date. The SRFB recognizes that some restoration projects may not be quite ready for funding due to pending design plans, landowner readiness, or capacity of local sponsors. Any

restoration projects for which funds have been reserved must be reviewed and approved by the SRFB and will be issued a project agreement.

Projects seeking funding for the construction phase, where funds were reserved by the SRFB, may come forward for funding at any future SRFB meeting once the following are completed:

1. The design work is completed.
2. The lead entity technical and citizen advisory groups have reviewed the design and construction cost estimates, and identified no major concerns (using their local criteria).
3. The SRFB Review Panel has reviewed the design and construction costs estimates, and identified no major concerns (using the SRFB project of concern criteria).
4. Coordination has occurred with the Puget Sound Partnership and the project is in the respective watershed's 3-year work plan.
5. The Leadership Council of the Puget Sound Partnership has reviewed and approved the project.
6. Appropriate match has been identified and secured to complete the project.

Once a project has completed the six steps mentioned above, the sponsor and lead entity will complete a SRFB application in PRISM and submit a request for construction funding. The request will be made through the lead entity and will not exceed the amount initially reserved for that project. Review by the SRFB Review Panel will be necessary to ensure consistency with the design, in the context of any changes proposed. Also, projects need to receive approval from the Leadership Council of the Puget Sound Partnership and the Puget Sound Salmon Recovery Council. RCO staff will take the completed application form, review panel evaluation, Puget Sound Partnership review, staff recommendation, and Leadership Council approval to the SRFB for funding approval. Once approved by the SRFB, RCO staff will develop a project agreement with the project sponsor. Puget Sound Acquisition and Restoration funds must be spent within the time period specified in the project agreement.

Funding Timeline

Puget Sound Acquisition and Restoration funds allocated in 2013 must be spent by June 30, 2017. A construction phase project must be under agreement no later than December 31, 2015.

Appendix Q:

Barrier Information Forms

To download a form into which you may enter information, visit the RCO Web site at www.rco.wa.gov/doc_pages/app_materials.shtml#salmon.

Barrier Evaluation Form - Dam

Location Information

Project Name: _____ DBP Project #: _____ County: _____
 Address: _____
 GPS Location: Datum: NAD83 decimal degrees
 Latitude: _____ Longitude: _____
 Township: _____ Range: _____ East: ☐ West: ☐
 Stream Name: _____ Tributary To: _____
 Draining Direction: _____

Landowner Information

Landowner: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Cell: () _____ Fax: () _____ Email: _____
 Landowner Agent: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Cell: () _____ Fax: () _____ Email: _____

Evaluator Information

Evaluator Name: _____ Affiliation: _____
 Mailing Address: _____ City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____ Cell: _____ Email: _____

Barrier Information (measurements in meters)

Is there a road on top of the dam? ☐ Yes ☐ No ☐ If no, stop. The dam does not qualify for the RRRR. If yes, continue.
 Is the stream fish-bearing? ☐ Yes ☐ No ☐ Species: ☐ Fishless ☐ Date of Visit: _____
 Fish-bearing criteria: ☐ Fish Observation ☐ Stream Type ☐ SASS Stream Catalog ☐ Physical Criteria ☐ Other: _____

Stream flow: ☐ Seasonal ☐ Intermittent ☐ Unknown ☐ Source of information: _____
 Primary passage: ☐ Debris control ☐ Pool Control ☐ Hydraulic ☐ Ingestion ☐ Navigation ☐ Block hand ☐ Water Quality ☐ Recreation ☐ Water Supply ☐ Filling ☐ Other (describe): _____
 Type: ☐ Concrete ☐ Earth ☐ Rock ☐ Masonry ☐ Metal ☐ Timber ☐ Other: _____ Span: ☐ Full ☐ Partial
 Outcrop: ☐ Spilling ☐ Overflow ☐ Reinforced floor ☐ Culvert ☐ Operation Timing: ☐ Year-round ☐ Seasonal
 Length: _____ Height: _____ Water surface difference: _____ Runoff and depth: _____ Runoff (feet): ☐ Yes ☐ No
 Description comments: _____
 Is this dam a fish passage barrier? ☐ Yes ☐ No ☐ Problem with dam: ☐ No stop ☐ Depth ☐ Other ☐ Unknown
 Percent passability: ☐ 0% ☐ 10% ☐ 25% ☐ 50% ☐ 75% ☐ 100% ☐ Beneficial (upstream of dam influence): _____ Road width: _____
 Will this dam be entered into the WDFW-PDQ (formerly SP-CAS database)? ☐ Yes ☐ No ☐ If yes, SP-ID # _____

Barrier Evaluation Form - Non Culvert Crossing

Location Information

Project Name: _____ DBP Project #: _____ County: _____
 Address: _____
 GPS Location: Datum: NAD83 decimal degrees
 Latitude: _____ Longitude: _____
 Township: _____ Range: _____ East: ☐ West: ☐
 Stream Name: _____ Tributary To: _____
 Draining Direction: _____

Landowner Information

Landowner: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Cell: () _____ Fax: () _____ Email: _____
 Landowner Agent: _____
 City: _____ State: _____ Zip: _____ Phone: () _____
 Cell: () _____ Fax: () _____ Email: _____

Evaluator Information

Evaluator Name: _____ Affiliation: _____
 Mailing Address: _____ City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____ Cell: _____ Email: _____

Barrier Information (measurements in meters)

Is the stream fish-bearing? ☐ Yes ☐ No ☐ Unknown ☐ Species: _____ Date of Visit: _____
 Fish-bearing criteria: ☐ Fish Observation ☐ Stream Type ☐ SASS Stream Catalog ☐ Physical Criteria ☐ Other: _____

Stream flow: ☐ Seasonal ☐ Intermittent ☐ Unknown ☐ Source of information: _____
 Will this structure be entered into the WDFW-PDQ (formerly SP-CAS database)? ☐ Yes ☐ No ☐ If yes, SP-ID # _____
 Crossing Type: ☐ Bridge ☐ Road ☐ Function: ☐ Handover ☐ Manual ☐ Unchecked
 Beneficial width outside influence of structure: _____ Runoff (feet): ☐ Yes ☐ No ☐ If yes, describe in comments: _____
 Is this structure a fish passage barrier? ☐ Yes ☐ No ☐ Unknown ☐ Runoff: _____
 Road width (with shoulder): _____ Percent Passability: ☐ 0% ☐ 10% ☐ 25% ☐ 50% ☐ 75% ☐ 100%
 Comments: Describe crossing condition, fish observations, habitat quality, etc.

Expanded Barrier Evaluation Form

Project Information

Project Name: _____ DBP Project #: _____ Date: _____

Evaluator Information

Evaluator Name: _____ Affiliation: _____
 Mailing Address: _____ City: _____ State: _____ Zip: _____
 Phone: _____ Fax: _____ Cell: _____ Email: _____

Watershed Information

Amount of habitat upstream: ☐ No ☐ Very little ☐ Moderate ☐ High ☐ Very high ☐ Basin area (square miles above culvert): _____
 Stream flow: ☐ Seasonal ☐ Intermittent ☐ Unknown ☐ Source of information: _____
 Has a barrier inventory been conducted in the watershed? ☐ Yes (road) ☐ Yes (stream survey) ☐ No ☐ Unknown
 If yes, list source and date completed: _____

Dam/wall type: ☐ Concrete ☐ Masonry ☐ Earth ☐ Rock ☐ Timber ☐ Metal ☐ Other: _____
 Distance walked: ☐ 0 ☐ 100 ☐ 200 ☐ 300 ☐ 400 ☐ 500 ☐ 600 ☐ 700 ☐ 800 ☐ 900 ☐ 1000 ☐ Other: _____
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Appendix R-1: Project Checklist Acquisition

Fee Simple Acquisitions Require the Following:

NOTE: Items marked "please provide ahead of time" should be provided to RCO at least two months before you close on the acquisition.

Please refer to the RCO [Manual 3, Acquisition Projects](#), December 2010 for all requirements and procedures on acquisition projects. This checklist is meant as a tool to help sponsors manage their deliverables to RCO once their projects are funded. Additional requirements may apply to your acquisition project.

- ☐ **Preliminary title report.** **The preliminary title report is due before the project is under agreement** with special note of any liens or mortgages requiring subordination or other encumbrances that will be cleared at closing. The appraiser should have received this before his/her valuation.
- ☐ **Annual billing** to RCO at a minimum (refer to project milestones to see if more frequent reports are required for your project).
- ☐ **Progress reports to RCO twice a year.** Progress reports can be entered directly into PRISM and are reviewed and accepted by the grants manager.
- ☐ **Notice of voluntary transaction.** In writing, inform the landowner that the transaction is voluntary. See [Manual 3, Acquisition Projects](#) for template.
- ☐ **Appraisal** ([Manual 3, Acquisition Projects](#)). **Please provide the appraisal ahead of time for review** so RCO can ensure it meets the requirements of *Manual 3, Acquisition Projects* and address any issues early on. The appraiser must be given a copy of RCO's Manual 3 and the preliminary title insurance before his/her valuation. Be sure the appraisal is done by a qualified appraiser, uses the correct reporting format, has not expired before purchase or signing of the purchase and sale agreement, follows state or federal guidelines as required (depending on

your funding source), and its legal description is correct and consistent among documents.

- ☐ **Appraisal review** ([Manual 3, Acquisition Projects](#)). **Please provide the appraisal review ahead of time for review** so RCO can ensure it meets the requirements of *Manual 3, Acquisition Projects* and address any issues early on. The review appraiser must be given a copy of RCO's Manual 3 before starting work. Be sure the appraiser follows the requirements of Manual 3 and that the appraiser is qualified.
- ☐ **Notice of Just Compensation.** Present the landowner with notice of appraised market value of property. Include offer of eligible tenant relocation, if applicable to project. See [Manual 3, Acquisition Projects](#) for template.
- ☐ **Relocation plan** if applicable to the project. See [Manual 3, Acquisition Projects](#) for relocation requirements.
- ☐ **Recorded survey.** If a survey was paid for with RCO funds and the property was successfully acquired, submit a recorded copy of the survey.
- ☐ **Deed.** The deed is recorded at closing. Provide draft for review before closing and a copy of the recorded document to RCO after closing.
- ☐ **Deed of Right.** RCO will draft and provide to project sponsor for recording. RCO will provide a copy to the project sponsor once it receives the original recorded document.
- ☐ **Boundary map** showing limits of the land purchase is required with the Deed of Right.
- ☐ **Hazardous substances certification** ([Manual 3, Acquisition Projects](#)) and supporting information.
- ☐ **Final title insurance** showing sponsor as legal owner is due promptly after closing on the acquisition.
- ☐ **Stewardship plan.** Submit a stewardship plan to RCO before closing the project. (See *Manual 18, Salmon Recovery Grants*, Appendix M-1 and M-2 for templates.)
- ☐ **Demolition of structures** on property must be complete, if applicable, before closing the grant. Any demolition or ground-disturbing restoration must go through cultural resources (Executive Order 05-05) review before initiating work.
- ☐ **Sign.** Install funding acknowledgement sign.

- ☐ **Complete any noxious weed control or fencing**, if applicable. Any ground-disturbing fencing or restoration must go through cultural resources (Executive Order 05-05) review before initiating work.
- ☐ **Acquisition final report enter into PRISM.** A final report must be submitted in PRISM before closing the project. Project metrics are verified by the sponsor and reviewed by the grants manager in the Final Report tab in PRISM.
- ☐ **Final reimbursement request.** Sponsor must submit final billing to RCO within 90 days of project complete milestone date.

Easements Require the Following:

NOTE: Items marked "please provide ahead of time" should be provided to RCO at least two months before you close on the easement.

Please refer to RCO [Manual 3, Acquisition Projects](#), December 2010 for all requirements and procedures on acquisition projects. This checklist is meant as a tool to help sponsors manage their deliverables to RCO. Additional requirements may apply to your acquisition project. See [Manual 3, Acquisition Projects](#).

- ☐ **Preliminary title report.** **The preliminary title report is due before the project is under agreement** with special note of any liens or mortgages requiring subordination or other encumbrances that will be cleared at closing. The appraiser should have received this before his/her valuation.
- ☐ **Annual billing** to RCO at a minimum (refer to project milestones to see if more frequent reports are required for your project).
- ☐ **Progress reports to RCO twice a year.** Progress reports can be entered directly into PRISM and are reviewed and accepted by the grants manager.
- ☐ **Conservation easement.** ([Manual 3, Acquisition Projects](#), Appendix H) **Please provide draft ahead of time for review (including all exhibits).** This document must contain all required elements in RCO [Manual 3, Acquisition Projects](#). Providing early drafts for review will help RCO identify problems early on – there is no need to wait until you have what you consider to be a final draft. Be sure to tell the landowner that the easement cannot be finalized until it has undergone RCO review. Provide a copy of the recorded easement to RCO promptly after it is recorded.
- ☐ **Baseline documentation and narrative** ([Manual 3, Acquisition Projects](#)). The baseline documentation must be referenced in the easement or be an exhibit in the easement. RCO recommends following the Land Trust Alliance standards for

developing baseline documentation. Baseline inventories must be signed by the landowner and easement holder at acquisition closing.

- ☐ **Boundary map** showing limits of the easement purchase must be included in easement and baseline documentation.
- ☐ **Notice of voluntary transaction.** In writing, inform the landowner that the transaction is voluntary. See [Manual 3, Acquisition Projects](#) for template.
- ☐ **Appraisal** ([Manual 3, Acquisition Projects](#)). **Please provide the appraisal ahead of time for review** so RCO can ensure it meets the requirements of Manual 3 and address any issues early on. The appraiser must be given a copy of RCO Manual 3 and the preliminary title insurance before his/her valuation. Be sure the appraisal is done by a qualified appraiser, uses the correct reporting format, has not expired before purchase or signing of the purchase and sale agreement, follows state or federal guidelines as required (depending on your funding source), and its legal description is correct and consistent among documents.,
- ☐ **Appraisal review** ([Manual 3, Acquisition Projects](#)). **Please provide this ahead of time for review** so RCO can ensure it meets the requirements of Manual 3 and address any issues early on. The review appraiser must be given a copy of RCO Manual 3 before starting work. Be sure the appraiser follows the requirements of Manual 3 and that the appraiser is qualified.
- ☐ **Notice of Just Compensation.** Present the landowner with notice of the appraised market value of the property. Include offer of eligible tenant relocation, if applicable to project. See [Manual 3, Acquisition Projects](#) for template.
- ☐ **Relocation plan** if applicable to the project. See [Manual 3, Acquisition Projects](#) for relocation requirements.
- ☐ **Recorded survey.** If a survey was paid for with RCO funds and the property was successfully acquired, submit a recorded copy of the survey.
- ☐ **Assignment of rights** ([Manual 3, Acquisition Projects](#)). The assignment of rights is between the sponsor and RCO, not the landowner. However, because it assigns certain rights to the state, the landowner needs to be fully aware of its contents and it is required to be an exhibit of the easement (in its unsigned form). RCO will draft and provide to the project sponsor for recording. RCO will provide a copy to the project sponsor once it receives the original recorded document.
- ☐ **Hazardous substances certification** ([Manual 3, Acquisition Projects](#)) and supporting information.
- ☐ **Mortgage/lien subordination.** Existing mortgages and liens on the subject property must either be made subordinate to the easement or paid off before or

in conjunction with closing of the acquisition. The landowner should secure the lender's commitment to subordinate before closing on the acquisition, although the subordination form will not likely be signed until after the acquisition closes. If the landowner will fully pay off the mortgage or lien in conjunction with closing on the acquisition, that commitment should be documented in a signed purchase and sale agreement.

- ☐ **Final title insurance** showing sponsor as legal owner is due promptly after closing on the acquisition.
- ☐ **Stewardship plan.** Submit a stewardship plan to RCO before closing the project. See *Manual 18, Salmon Recovery Grants*, Appendix M-1 for template.
- ☐ **Demolition of structures** on property must be complete, if applicable, before closing of the grant. Any demolition or ground-disturbing restoration must go through cultural resources (Executive Order 05-05) review before initiating work.
- ☐ **Complete any noxious weed control or fencing**, if applicable. Any ground-disturbing fencing or restoration must go through cultural resources (Executive Order 05-05) review before initiating work.
- ☐ **Acquisition final report.** Enter into PRISM. A final report must be submitted in PRISM before closing the project. Project metrics are verified by the sponsor and reviewed by the grants manager in the Final Report tab in PRISM.
- ☐ **Final reimbursement request.** Sponsor must submit final billing to RCO within 90 days of project complete milestone date.

Appendix R-2:

Project Checklist

Planning and Assessment

Planning Projects Require the Following:

- ☐ **Annual billing** to RCO at a minimum (refer to project milestones to see if more are required for your project).
- ☐ **Progress reports** to RCO twice a year. Progress reports can be entered directly into PRISM and are reviewed and accepted by the grants manager.
- ☐ **Assessment Projects** should submit the following:
 - ☐ **Draft assessment/planning report** submitted for RCO review. See project milestones for due date. Review by RCO staff is to ensure compliance with the project agreement.
 - ☐ **Completed assessment/planning report.** Electronic version of completed report should be attached in PRISM before closing the project.
- ☐ **Design Projects** (should submit one or more of the following, depending on the scope of the project. Refer to your agreement special conditions and Appendix D in *Manual 18, Salmon Recovery Grants* for a description of expected design project deliverables:
 - ☐ Conceptual design
 - ☐ Preliminary design
 - ☐ Final design
- ☐ **Other deliverables:** Your grant contract, depending on the type of project funded, may require other deliverables such as permits, landowner agreements, appraisals, etc. If you are not sure, check with your grants manager.

- ☐ **Planning final report.** Enter final report directly into PRISM. A final report must be submitted in PRISM before closing the project. This is where the sponsor will verify all project metrics.
- ☐ **Final reimbursement request.** Sponsor must submit final billing to RCO within 90 days of project complete milestone date.

Appendix R-3: Project Checklist Restoration

Restoration Projects Require the Following:

This checklist is meant as a tool to help sponsors manage their deliverables to RCO once their projects are funded. Additional requirements may apply to your restoration project. Please refer to Section 7 of *Manual 18, Salmon Recovery Grants* and [Manual 5, Restoration Projects](#) for more information on all requirements and procedures for restoration projects.

- ☐ **Annual billing** to RCO at a minimum. Refer to project milestones to see if more are required for your project.
- ☐ **Progress reports** to RCO twice a year. Progress reports can be entered directly into PRISM and are reviewed and accepted by the grants manager.

Pre-Agreement

- ☐ **Land Certification Form.** Sponsors of ALL restoration projects must submit [Appendix S: Land Certification Form](#) before RCO issues a project agreement. The intent of this form is to ensure that the sponsor has reviewed property information and that there are no existing deed restrictions, liens, easements, or other encumbrances that would impede construction, operation, or maintenance of the project.

Pre-Construction or Implementation

- ☐ **Landowner agreement** required for SRFB projects occurring on land that is NOT owned by the project sponsor ([Appendix L](#)). The landowner agreement is required before the start of construction. The agreement is a document between the sponsor and the landowner that, at a minimum, allows access to the site by the applicant for project implementation, inspection, maintenance, and

monitoring; clearly states that the landowner will not intentionally compromise the integrity of the project; and describes and assigns project monitoring and maintenance responsibilities. The landowner agreement must remain in effect for at least 10 years from the project agreement completion date. Applicants may use the SRFB's landowner agreement or other approved agreement formats. (Note that other agreement formats must be approved by RCO before you start construction). Landowner agreements are not required for sponsor-owned land.

- ☐ **Review of conceptual and/or preliminary designs** should be submitted to grants manager for review, if required by your project scope of work or agreement special conditions. See your agreement special conditions or [Appendix D](#) in *Manual 18, Salmon Recovery Grants*, for a description of expected design deliverables.
- ☐ **Final design/construction drawings**, design report, construction quantities and costs, technical specifications, and bid documents should be submitted to grants manager for review. These documents must be submitted at least two weeks before advertising for bids, or two weeks before construction if the project won't go to bid. See your agreement special conditions or *Manual 18, Salmon Recovery Grants*, [Appendix D](#) for a description of expected final design deliverables.
- ☐ **Documentation confirming cultural resources consultation complete.** RCO requires documented compliance with Washington State Executive Order 05-05 and/or Section 106 of the National Historic Preservation Act, whichever are applicable to the project. RCO will issue a notice to proceed when appropriate documentation has been received.

During Construction

- ☐ Any change orders that significantly change the project scope also must be submitted for review. Review by RCO staff is to ensure compliance with the project agreement.

Post Construction or Implementation

- ☐ **Post-construction as-built drawings** should be submitted, if different from final design.
- ☐ **Stewardship plan.** **Stewardship plans apply only to restoration projects on land owned or controlled by the project sponsor.** When applicable, a stewardship plan is required to be submitted with the final documentation at the close of the project to ensure site is maintained and/or monitored for at least 10 years. Applicants may use the outline in [Appendix M-2](#). For land not owned by project sponsor, the landowner agreement is required instead to document the commitment to maintain and monitor the site for at least 10 years.

- ☐ **Submit photographs** of the completed project.
- ☐ **Acknowledgement and signs.** Provide a copy or photograph of signs, as appropriate.
- ☐ **Restoration final report.** Enter final report directly into PRISM. A final report must be submitted in PRISM before closing the project. This is where the sponsor will verify all project metrics.
- ☐ **Project inspection** by RCO grants manager. Sponsor should be sure this is scheduled before closing the project and the final reimbursement payment.
- ☐ **Final reimbursement request.** Sponsor must submit final billing to RCO within 90 days of project complete milestone date.

Appendix S: Land Ownership Certification Form

The intent of this form is to ensure that the sponsor has reviewed property information and that there are no encumbrances that would adversely affect the ability to restore the property. This form is **required** to be submitted for all restoration projects. The form must be submitted before RCO issues a project agreement.

The _____ [*insert project sponsor name*], as Sponsor of RCO # _____ [*insert project number*] titled _____ [*insert project name*] certifies that _____ [*insert landowner(s) name(s)*] has/have fee ownership of the property. The Sponsor further certifies that they have discussed the project with _____ [*insert landowner(s) name(s)*] and / or reviewed current title information for the property, and that:

- ☐ There are no existing deed restrictions, liens, easements, or other encumbrances that would impede construction, operation, or maintenance of the project.

OR

- ☐ Existing deed restrictions, liens, easements, or other encumbrances may have immediate or potential impacts to construction, operation, or maintenance of the project. **Provide further explanation below.**

Signature of Authorized Agent of the Project Sponsor

Title _____

Date _____